

REQUEST FOR PROPOSAL

**NET IMPACT AND COST-BENEFIT EVALUATION OF
WASHINGTON STATE'S WORKFORCE TRAINING SYSTEM**

Workforce Training and Education Coordinating Board
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PO Box 43105
Olympia, WA 98504-3105

March 21, 2005

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1. OVERVIEW

1.1 Background

The Workforce Training and Education Coordinating Board (Workforce Board) was established in 1991 with the responsibility for coordinating policy planning and evaluation for the state's workforce training system. Among its specific responsibilities, the Workforce Board is required by the Washington State RCW 28C.18.060(10) to "administer scientifically based net-impact and cost-benefit evaluations of the state training system." The objective of these evaluations is to determine the short-term and long-term impacts of program participation on employment, wages, hours worked, quarterly earnings, and receipt of UI benefits and public assistance. The last such evaluations were conducted in 1997 and 2002. The next is due in April 2006.

The 2002 study evaluated nine programs: Job Training Partnership Act (JTPA) II-A (Adults), JTPA III (Dislocated Workers), JTPA II-C (Youth), job preparatory training provided at community and technical colleges, worker retraining at community and technical colleges, work-related adult basic education at the community colleges, job preparatory training at private career schools, apprenticeships and secondary vocational-technical education. The study, in order to assess both short-term and longer-term impacts, analyzed outcomes for participants who exited programs during the 1997-98 and 1999-00 program years. Comparison groups were selected from registrants with the Washington State Employment Security Department's Labor Exchange Service. A separate comparison groups was selected for secondary vocational- technical education from among high schools students who did not participate in vocational-technical education. An empirical approach, called statistical matching, was used to find the Employment Service registrant who most closely matched each program participant in terms of a long list of characteristics—demographics (e.g., race, ethnicity, gender, disability status, prior education, age, region of the state), preprogram earnings and employment history, UI benefit receipt history, and preprogram receipt of public assistance. Propensity score matching (without replacement) was used to select comparison group members. Other matching techniques, such as nearest neighbor algorithms, were also investigated.

The 2002 study was conducted by the W.E. Upjohn Institute for Employment Research. Results may be found in Workforce Training Results 2002: <http://www.wtb.wa.gov/wtr2002.pdf>, the Workforce Board publication we are replicating with this procurement, or in: Net Impact and Benefit-Cost Estimates of the Workforce Development System in Washington State, Upjohn Institute Technical Report No. TR03-018, by Kevin M. Hollenbeck and Wei-Jang Huang, July 2003. <http://www.upjohninst.org/publications/tr/tr03-018.pdf>

1.2 Proposed Research and Services to be Purchased

A. Programs to be Evaluated

The proposed study will evaluate thirteen training programs in Washington State. These include the Workforce Investment Act (WIA) programs that replaced Job Training Partnership Act (JTPA) programs for adults, dislocated workers, and youth,¹ secondary and postsecondary vocational education programs, private career schools, apprenticeships, and work-related adult basic education programs. We also ask that bidders propose methods to evaluate vocational rehabilitation programs. The programs are diverse, and they serve very different populations.

The eleven programs are:

- WIA I-B (Adults)
- WIA I-B (Dislocated Workers)
- WIA I-B (Youth)
- Job preparatory training at community and technical colleges
- Worker retraining at community and technical colleges
- Work-related adult basic education at community and technical colleges
- Job preparatory training at private career schools
- Apprenticeships
- Secondary Vocational-Technical Education
- Vocational rehabilitation by the State Division of Vocational Rehabilitation
- Vocational rehabilitation by the State Department of Services for the Blind.

B. Net Impact Analysis

i. Research Objectives

The research will estimate the short-term and long-term net impacts of program participation on the following post-program outcomes.

- Employment rates
- Hourly wages
- Hours worked per quarter
- Quarterly earnings
- Receipt of Unemployment Insurance (UI) Benefits
- Receipt of Temporary Assistance for Needy Families (TANF)
- Receipt of Food Stamps
- Receipt of Medicaid benefits
- Receipt of Supplementary Security Income (SSI)

¹ This evaluation will be the first to include participants who exited programs after the implementation of the WIA in July of 2000.

Short-term impacts, which are observed during the third post-program quarter, will be based on outcomes for participants exiting during the 2003-04 program year. Longer-term impacts, which are observed during the third year after exit, will be based on outcomes for those leaving programs during 2001-02. Program years run from July 1 of the first year to June 30 of the succeeding year.

The research should focus on estimating direct effects. It will evaluate the effectiveness of programs on a statewide basis and not the effectiveness of individual institutions, regions or courses of study.

The research should, to the extent that the data and resources permit, examine how impacts differ by factors such as the receipt of training versus other services, completion of training, credential attainment, and barriers to employment. This will complicate the choice of estimators and could subject the analysis to stronger underlying assumptions. However, it would add substantially to the value of the study.

ii. Methodology

The evaluation will be non-experimental. The Workforce Board prefers that a matched comparison group methodology be attempted for each program, in a manner that mitigates selectivity and other sources of bias. However, given the diversity of these programs, a single approach may not fit all. We anticipate that it will be difficult to find adequate matched comparison groups for some programs, and 'before-after' estimators may be used when the comparison group pools do not yield sufficiently comparable members.

The Workforce Board will consider all proposals by the bidder for selecting the comparison groups. Previous studies have drawn comparison group members from three pools: (1) large samples of Employment Security Department (ESD) Labor Exchange Service registrants for the 2001-02 and 2003-04 program years, (2) samples of general track (i.e., not vocational or college preparatory) high school students who exited during the two years, (3) samples of vocational rehabilitation participants who applied for services but were not served.² The data being collected for this study, described below, will allow for the exclusion of students who enroll in postsecondary training from comparison groups for youth or disabled populations. The Workforce Board will, to the extent possible, minimize contamination bias by collecting program administrative data for additional years in order to exclude former program participants from potential comparison groups.

iii. Data

The Workforce Board will supply the contractor with data from several sources. Administrative records from each program provide information on participant demographics, training, and other services received. ESD provides records for WIA programs. The State Board of Community and Technical Colleges provides data for job preparatory, worker retraining, and adult basic education programs; the State Department of Labor and Industries provides data for

² For an example of this method, see: Dean, D.H., Dolan, R.C., Schmidt, R.M., Wehman, P., Kregel, J., and Revell, G. "A Paradigm for Evaluation of the Federal-State Vocational Rehabilitation Program" in J. Kregel, D. H. Dean, and P. Wehman (Eds.) *Achievements and Challenges in Employment Services for People with Disabilities*: Richmond, Virginia Commonwealth University (2002).

apprenticeships; the Office of Superintendent of Public Instruction for secondary vocational-technical education participants; the State Department of Social and Health Services (DSHS) provides data for participants in the federal-state vocational rehabilitation services, the State Department of Services for the Blind provides data for participants in its vocational rehabilitation program, and the Workforce Board collects records for private career school students. Data include all terminees (both completers and leavers) for each program except secondary vocational-technical education, which includes only vocational completers.³

The Workforce Board coordinates a series of administrative record matches that provide data on the labor market and public assistance receipt histories for program participants and potential comparison group members. Matches with ESD unemployment insurance (UI) wage records provide employment and earnings data for participants who have reported social security numbers.⁴ The UI files contain information only on those individuals with employment reported for unemployment insurance purposes; about 90 percent of the total employment in the state, with self-employment being the largest omission. ESD, in addition to matching with Washington State records, sends social security numbers for UI wage matches in Alaska, Oregon, Idaho, and Montana.

The Workforce Board has approached the National Association of State Workforce Agencies to request use of UI wage records collected from 48 or the 50 states through the Wage Record Interchange System in this evaluation. At this writing it is not clear whether permission will be received to use these data. If permission is granted, it may be on a state-by-state basis. Workforce Board will also approach the Federal Employment Data Exchange System to request employment and earnings records for the federal Office of Personnel Management, Department of Defense, and United States Postal Service.

Matches with ESD UI benefit records provide data on receipt of unemployment benefits, and matches with DSHS yield data on receipt of TANF, Food Stamps and Medicaid benefits. Matches with postsecondary education and training records provide information on the enrollment status of former program participants. The Workforce Board match with enrollment data provided by each of the public four-year colleges and universities, community and technical colleges, apprenticeship committees, and most of the private career schools in the state.

The data on participant demographics varies from program to program. In general, the information for participants and potential comparison group members will include: age, race/ethnicity, education at program entry, disability status, English as a second language status, gender, region of state, and veterans status. The data on services received also varies by

³ A secondary vocational-technical education student is classified as a completer if they complete 360 hours of sequenced vocational classes.

⁴ Social security numbers are reported for most participants in most programs. The exceptions are secondary vocational-technical education and private career school programs, where substantial proportions of students do not provide social security numbers.

program. The information usually includes program completion status, receipt of training, length of training, and credential attainment. Data from the administrative matches are used to create quarterly variables that reflect pre-program and post-program labor market⁵. These quarterly variables include: reported employment, hours worked, earnings, hourly wage rate, industry of employment. The Workforce Board can retrieve UI wage data from the late 1980s through the first quarter of 2005.

Participant information will be merged with records from the matches to create Access relational databases for each of the programs and the potential comparison group pools. These databases will be provided to the contractor. In some cases, there will be missing essential data that should be imputed by the contractor. In the prior study, imputation was done for data such as hours worked per quarter, which is normally found in the UI wage records. The successful bidder will have an opportunity to advise the Workforce Board regarding the content and structure of these databases. The approximate numbers of participant records included in the data are as follows.

Approximate Numbers of Participant Records		
<u>Program</u>	<u>2001-02 Exiters</u>	<u>2003-04 Exiters</u>
WIA I-B Adults	2,400	3,900
WIA I-B Dislocated Workers	3,125	5,200
WIA I-B Youth	2,250	3,100
Community College Job Preparatory Training	31,700	40,000
Community College Worker Retraining	7,500	7,000
Community College Adult Basic Education	15,700	15,000
Private Career School Training	16,500	20,000
Apprenticeship	3,100	3,000
Secondary Vocational-Technical Education	11,500	12,000
Vocational Rehabilitation	2,500	2,500
School for the Blind	190	200
<u>Comparison Group Pools</u>		
Labor Exchange Service Registrants	230,000	230,000
Samples of General Track High School Exiters	20,000 ⁽¹⁾	25,000 ⁽¹⁾
Samples of Unserved Rehab Applicants	?????	?????
(1) The number of relevant records from the Graduate Follow Up Survey has yet to be determined. This is a very rough estimate.		

Information on public assistance, food stamp, and Medicaid history will need to be obtained under contract with DSHS, summarized by quarter of receipt or payment, and matched to participant records. The Workforce Board will assist in obtaining human subject research reviews and the public assistance information for participants involved in the study, but requests that the contractor summarize and index the data. Information on UI benefits will need to be summarized by quarter of payment and matched to participant records by the contractor.

⁵ We expect to have only limited pre-program employment and earnings data for participants in programs serving youth.

C. Cost-Benefit Analyses

The net impact estimates will be used to determine program benefits. The analysis should take into account impacts on earnings, employee benefits,⁶ foregone earnings, UI benefits, welfare benefits, and taxes.

The analysis should compare estimated benefits to program costs. The Workforce Board will, under guidance provided by the contractor, collect data on program costs.

1.3 Minimum Requirements

The minimum requirements for each bidder are:

- Experience in conducting non-experimental net impact studies and cost-benefit analyses
- Experience in evaluating education, employment, and training programs
- Availability of adequate staff and other resources to perform the work in the proposed time frame

Bidders who do not meet these minimum qualifications shall be deemed non-responsive and will not receive further consideration.

1.4 Period of Performance

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2005 and be in force through May 31, 2006. The contract length is set two months beyond the proposed March due date in order to reduce the administrative burden of extending the contract should extra time be needed. Amendments extending the period of performance beyond May 31, 2006, if any, shall be at the sole discretion of the Workforce Board and will be established in writing.

1.5 Funding and Method of Payment

The maximum level of funding available under the proposed contract is \$275,000. Cost will be a major consideration in selecting the successful bidder.

Payments will be made as phases of the project are completed.

1.6 Definitions

Definitions for the purposes of this RFP:

Bidder - Person, organization, or company submitting a proposal in order to obtain a contract with Workforce Board.

Contractor - Bidder whose proposal has been accepted by Workforce Board and is awarded a formal written contract.

⁶ The previous study assumed employee benefits to be a fixed proportion of earnings.

Workforce Training and Education Coordinating Board (Workforce Board) - The agency responsible for coordinating, policy, planning, and evaluation for the workforce training system in Washington State as established by Chapter 238, Washington Laws, 1991.

Request for Proposal (RFP) - Formal procurement where a service or need is planned but no specific service or method has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

1.7 ADA

The Workforce Board complies with the Americans with Disabilities Act (ADA). Bidders may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

2. INSTRUCTIONS TO BIDDERS

2.1 RFP Coordinator

The RFP Coordinator is the sole point of contact at Workforce Board for this selection action. All communication between the bidder and Workforce Board upon receipt of this RFP shall be with the RFP Coordinator.

Evelyn Hawkins, RFP Coordinator
Workforce Training and Education Coordinating Board
128 10th Avenue SW, 6th Floor
PO Box 43105
Olympia, WA 98504-3105
Phone: (360) 753-5652
Fax: (360) 586-5862
E-mail: ehawkins@wtb.wa.gov

2.2 Submission of Proposals

Bidders are required to submit an original and five copies of the proposal. The proposal, whether mailed or hand delivered, must arrive at the Workforce Board at the address above no later than 5:00 pm Pacific Time, May 13, 2005. Faxed or e-mailed proposals will not be accepted.

The proposal shall be addressed to the RFP Coordinator at the address noted in Section 2.1. The envelope should be clearly marked to the attention of the RFP Coordinator.

Bidders mailing proposals should allow for normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Late proposals will not be accepted and will be automatically disqualified from further consideration. Electronic copies of the proposals will not be accepted in lieu of hard copies.

All proposals and any accompanying documentation become the property of the Workforce Board and will not be returned.

2.3 Proposal Format

All proposals must be on 8.5 by 11" inch paper, typed in font size no smaller than 10-point, and placed in binders with tabs separating major sections. The major sections shall include a **Letter of Submittal**, the **Technical Proposal**, the **Management Proposal**, and the **Cost Proposal**. **The Technical Proposal shall not exceed 25 pages.**

Part 1 - Technical Proposal

The Technical Proposal must contain work requirements necessary to accomplish the tasks as defined in Section 3.2, Technical Specifications, of this RFP. The proposal will outline the proposed approaches, methodologies, work plan, and time frames necessary to accomplish the tasks. The work plan should state which staff would be assigned to each activity. The proposal will include a project schedule specifying how the bidder will produce the net impact and cost-benefit results by the end of March 2006.

The technical proposal should give special attention to:

- Addressing potential problems with the data that the Workforce Board has proposed to provide for the analysis (e.g., under-estimation of employment rates in UI wage data). Refer to Section 1.2.B.iii for a description of the proposed data.
- Describing the methodology that will be used to select comparison group members. What measures will be taken to minimize potential sources of bias? How will the validity of selected comparison groups be assessed?
- Describing potential estimators used in the net impact analysis. The final selection of estimators cannot be made until the contractor has analyzed the data. However, bidders should discuss the estimators that will be considered for cases where matched comparison groups are deemed valid and for cases where they are not. Discuss issues such as how the choice of estimators will be made, whether or not comparison groups will be weighted, and whether non-parametric econometric methods will be considered. In cases where before-after estimators are proposed, address problems arising from life-cycle effects and pre-program dips in employment rates.
- Discussing how program benefits and costs will be treated.

Part 2 - Management Proposal

The Management Proposal must contain the information regarding the firm, staff qualifications, related experience, and references as requested in Section 4, Management Proposal. The management proposal must contain equivalent information for any planned subcontractors.

Part 3 - Cost Proposal

It is anticipated that there will be a fixed-price contract. The bidder shall submit a sufficiently detailed budget, including staff costs and major non-labor expenses, to allow the bid selection team to assess whether the bidder can accomplish the proposed work within the proposed compensation rate.

It is the policy of the Workforce Board that the maximum amount of administrative costs (including indirect costs and/or indirect cost rate of educational institutions) shall not exceed 5 percent. All budget and expenditure accounting will reflect this maximum. No payments of invoices will be processed with indirect costs or administrative costs that exceed this maximum.

2.4 Signatures

The Letter of Submittal must be signed and dated by a person authorized to legally bind the bidder to a contractual relationship (e.g., the president or executive director if a corporation, appropriate dean if a university, the managing partner if a partnership, or the proprietor if a sole proprietorship).

2.5 Pre-proposal Questions

The Workforce Board will accept questions concerning this RFP via fax or e-mail until 5:00 pm Pacific Time, April 29, 2005 in Olympia, Washington at (360) 586-5862 or ehawkins@wtb.wa.gov. Please telephone Evelyn Hawkins, RFP Coordinator, at (360) 753-5652 or Barbara Mix, Secretary Administrative at (360) 586-3322 if any special accommodations are required to submit questions.

A copy of the questions and answers from all questions will be sent to each prospective bidder who received a copy of the RFP. The Workforce Board shall be bound only to written answers to questions. Any oral responses given shall be considered unofficial.

2.6 Tentative Schedule of Activities

March 21, 2005	Issue Request for Proposal
April 11, 2005	Questions Due
May 13, 2005	Proposals Due
May 27, 2005	Announce Selected Proposal
June 10, 2005	Conclude Contract Negotiations
July 1, 2005	Contract Begins
November 11, 2005	Workforce Board Supplies Final Databases for Analysis to the Contractor ⁷
February 24, 2006	Preliminary Report on Net Impact and Cost-Benefit Analyses
March 31, 2006	Final Report on Net Impact and Cost-Benefit Analyses
May 31, 2006	Contract Ends

Required dates in bold; all others are suggested.

2.7 Failure to Comply

The bidder is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive. Each proposal must provide evidence of the ability to implement all or most RFP tasks as a complete package. Bids for single tasks will be deemed non-responsive. Bids from teams under the auspices of one major bidder are acceptable.

⁷ The WTB would provide portions of the data sooner as they become available.

2.8 Rejection of Proposals

The Workforce Board reserves the right, at its sole discretion, to reject without penalty any or all proposals received. The final selection, if any, will be that proposal which, in the opinion of Workforce Board after review of all submissions by the Proposal Review Committee, best meets the requirements set forth in this RFP and is in the best interest of Washington State. The Workforce Board also reserves the right, at its sole discretion, to waive minor administrative irregularities contained in any proposal.

2.9 Selection in the Event of Close Scores

When evaluation of the proposals produces numerical ratings that are substantially equivalent (i.e., scores separated by less than 3 percent of the total available points), the Workforce Board reserves the right to award the contract to the bidder whose proposal is deemed to be in the Workforce Board's best interest. Criteria defining the best interest of Workforce Board and procedures to be followed will be communicated to affected bidders in the event of a tie.

2.10 Acceptance Period

Proposals providing less than 45 days for acceptance by the Workforce Board from the date set for opening of proposals will be considered non-responsive and will be rejected.

2.11 Revisions to the RFP

In the event it becomes necessary to revise any part of the RFP, addenda will be provided to all persons who receive the RFP. If any prospective bidder has reason to doubt whether the Workforce Board is aware of the bidder's interest, it is incumbent on the bidder to notify the Workforce Board to be sure that addenda are received. Mail, fax, or call such notice to the RFP Coordinator.

2.12 Most Favorable Terms

The Workforce Board reserves the right to make an award in whole or in part without further The discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms that the bidder can propose. There will be no best and final offer process. Bidders should be prepared to accept language from this RFP and their own proposal for incorporation into the contract resulting from this RFP. It is understood that the proposal will become a part of the official file on this matter without obligation to the Workforce Board.

2.13 Obligation to Contract

This RFP does not obligate Washington State or the Workforce Board to contract for services specified herein.

2.14 Authority to Bind Workforce Board

The Workforce Board Executive Director or her designee are the only individuals who may legally commit the Workforce Board to the expenditures of public funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of either a fully executed contract or specific written authorization from the Executive Director or designee.

2.15 Costs to Proposer

The Workforce Board will not be liable for any costs incurred by the bidder associated with the preparation of a proposal submitted in response to this RFP.

2.16 Level of Support

The Workforce Board will not be responsible for supplying material or logistical support to the contractor beyond what is specifically identified in the technical specifications. Workforce Board staff will be available for technical consultation and to identify other organizational entities and key personnel relevant to the conduct of the matching process.

3. TECHNICAL SPECIFICATIONS

The programs to be evaluated, the research components, and proposed data are discussed in Section 1.2. Issues to be addressed in the technical proposal are discussed in Section 2.3. The major research tasks are listed below.

3.1 The Workforce Board will perform the following tasks:

1. The Workforce Board will collect program administrative data, demographic data on program participants and potential comparison group members, and data on participant and comparison group outcomes (employment, earnings, receipt of UI benefits, and public assistance receipt).

The Workforce Board will summarize information on employment, earnings, and participant education by quarter and will supply indexes identifying the relationship of these quarters to the quarter of program start and program exit. These data are described in Section 1.2.B.iii.

2. The Workforce Board will, to the extent possible, collect data to remove former participants and those receiving substitute services from potential comparison groups.
3. Workforce Board will collect data on program costs and provide these data to the successful bidder.
4. Workforce Board will address questions regarding the data, provide information regarding the programs, and coordinate any interactions with program managers that are required.

3.2 The Contractor will perform the following required tasks:

1. Review Workforce Board data collection efforts and provide guidance on the construction of the databases that will be used in the analysis.
2. Construct files summarizing receipt and costs of public assistance, food stamps, unemployment insurance benefits, and medical assistance participation on a quarterly basis from files supplied by the Workforce Board.
3. Advise the Workforce Board regarding the collection of required program cost data.
4. Attempt to select matched comparison group members for each of the eleven programs listed in Section 1.2.A, using the data discussed in Section 1.2.B.iii. Assess the extent to which the selected comparison groups support valid net impact estimates for each program.

5. Estimate short-term and long-term net impacts by examining the outcomes for participants leaving programs during the 2001-02 and 2003-04 program years. The outcomes of interest are listed in Section 1.2.B.i. A matched comparison group methodology should be attempted for each program. However, before-after estimators may be used when the comparison group pools do not yield sufficiently comparable members. The analysis should, when possible, examine the extent to which impacts differ by factors such as the receipt of training versus other services, completion of training, credential attainment, and barriers to employment.
6. Use net impact results to estimate program benefits.
7. Conduct cost-benefit analyses for each program.
8. Report the net impact and cost-benefit results to the Workforce Board.

3.3 Reporting Requirements

The contractor shall be responsible for providing monthly progress reports during the life of the contract with emphasis on adherence to planned timelines.

The Workforce Board reserves the right to request additional status reports related to various aspects of the project and the right to modify the deliverables after the start of the contract.

3.4 Proposed Schedule of deliverables

Preliminary Report	February 24, 2006
Final Report	March 31, 2006

The Preliminary Report should present initial net impact and cost-benefit estimates, briefly discuss the methodologies used, and highlight important methodological concerns. The purpose of this report is to provide the Workforce Board with an opportunity to comment on the analysis. The Final Report should be a revision of the Preliminary Report that incorporates the Workforce Board suggestions and presents the final estimates.

We do not expect, given the proposed schedule, that these reports be lengthy. The results should be presented in tables and the narrative need only be long enough to let us understand how the estimates were derived. Note that the Workforce Board will disseminate the findings by incorporating them into our biennial report, *Workforce Training Results*.

4. MANAGEMENT PROPOSAL

Provide all information requested below. Any bidder intending to subcontract any of the proposed work shall submit this information for each proposed subcontractor.

4.1 Identifying Information

1. Name, address, fax, and telephone number of the legal entity with whom the contract is to be written.
2. Name, address, e-mail, fax, and telephone numbers of principal officers (president, vice president, treasurer, chairperson of the board of directors, etc.).
3. Legal status of the bidder (public agency, nonprofit, corporation, etc.) and year entity was established.
4. Federal employer ID number.
5. Washington State Uniform Business Identification number issued by the Department of Revenue. Registration for a UBI costs \$20.00 and is available by calling 1-800-647-7706.
6. Name of the project manager.
7. If the bidder or any party named in sections 4.1.1, 4.1.2, or 4.1.6 is, or was, an employee of the state of Washington in the past 24 months, indicate his/her social security number, job title, employing agency, and separation date.
8. Bidders who employ or have on their governing board as of the date of their bid, Washington State employees or former Washington State employees shall identify such persons and their positions and responsibilities within the bidder's organization.

4.2 Experience of the Bidder

Please describe your team's experience with the methods and subject matter of this study. Indicate the experience the bidder has had, if any, in the following areas:

1. Conducting Non-experimental Net Impact Evaluations. Bidders should describe the methodologies used.
1. Conducting Studies of Education, Employment, and Training Programs. Bidders should list the programs that were evaluated.
2. Conducting Cost-Benefit Analyses.
4. Experience Using Data From Administrative Record Matches (UI wage data, UI benefit data, and public assistance receipt data)
5. Other Experience. Describe any other experience supporting your qualifications for the contract.

4.3 Project Management

1. Describe the proposed project staffing/organization your team will use during the course of the project.

2. Identify staff who will be assigned to the contract. Indicate the responsibilities and qualifications of key staff and how much time each will be assigned to the project. Provide resumes for all key staff. All bidders must commit that the key staff identified in its proposal will actually be assigned to this project. Any substitution must have the approval of Workforce Board.
3. Provide an organizational chart indicating the lines of authority for personnel involved in performance of the potential contract. This chart must also show lines of authority to the next senior level of management. If subcontractors are used, describe lines of authority and process for managing accountability for the final product.
4. Identify who within the team will have final authority for the work.

4.4 Process for Responding to Changing Requirements

The bidder should identify the process by which it will be able respond to delays, schedule changes, or other unanticipated barriers to project completion.

4.5 Bidder References

1. List all contracts over \$100,000 with Workforce Board and/or other Washington State agencies during the last five years. Provide the name of the contracting agency, period of performance, contact person in the respective agency and telephone number, and a brief description.
2. List any contracts the bidder or subcontractors may have had during the last five years that relate to the bidder's ability to perform the services called for under this RFP. List contract titles, name of contracting agency, period of performance, contact persons and telephone numbers, and provide a brief description.
3. Supply names, addresses, and telephone numbers of three client references, and briefly describe the type of service provided in the contracts.
4. Indicate if the bidder has had a contract terminated for default in the last five years. Termination for default is defined as notice to stop performance, which was delivered to the bidder due to the bidder's nonperformance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the bidder, or (b) litigated and determined that the bidder was in default.

NOTE: If the bidder has had a contract terminated for default in this period, then the bidder shall submit full details including the other party's name, address, and telephone number. The Workforce Board will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the bidder's past experience.

5. By naming them in the proposal the bidder grants permission to the Workforce Board to contact all references.

4.6 Minority and Women-Owned Business (MWBE) Participation

In accordance with the legislative findings and policies set forth in Chapter 39.19 RCW Washington State encourages participation in all of its contracts by MWBE firms certified by the Office of Minority and Women Owned Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or as a subcontractor to a Bidder/Proposer.

However, unless required by federal statutes, regulations, grants, or contract terms referenced in the contract documents, no preference will be included in the evaluation of bids/proposals, no minimum level of WMBE participation shall be required as a condition for receiving and award and bids/proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract will apply.

Bidders who are certified as MWBE or whose proposals include subcontracts with firms certified as MWBE are encouraged to provide proof of certification in the management proposal. Identification of MWBE bidders will help Workforce Board to determine whether it has provided notice to potential contractors in a manner reasonably designed to provide MWBEs capable of performing this work the opportunity to respond.

5. COST PROPOSAL

5.1 Identification of Costs

Identify the total costs to be billed to Workforce Board to accomplish the objectives of the contract. Provide sufficient detail to allow the bid evaluation team to assess the level of staff and other resources, which will be devoted to the project. Items which should be included in detail include name(s) of staff charging to the study component, planned amount of time devoted to the study component by each staff, planned travel and per diem expenses, and all other planned expenses. This information will be used to determine if the proposed rate appears to be realistic.

5.2 Funding Available

Cost proposals should not exceed \$250,000 for the contract period. Workforce Board does not plan to spend more than necessary to produce an acceptable product. Bids totaling \$250,000 are unlikely to be accepted if reasonable lower cost options are available.

5.3 Award Not Based on Price Alone

The evaluation process is designed to award this procurement to the bidder whose proposal best meets the requirements of this RFP, not necessarily the bidder of least cost.

6. EVALUATION AND CONTRACT AWARD MISCELLANEOUS PROVISIONS

6.1 Evaluation Team

Proposals will be reviewed and evaluated by a committee consisting of representatives of the Workforce Board and its partner agencies. Written submittals and, if necessary, oral presentations will be used to select the winning proposal. If there are more than three responses to this RFP, the Workforce Board may select three firms as finalists for an oral presentation to determine final contract award.

6.2 Evaluation Scoring and Criteria

The following weights will be assigned to the proposal for evaluation purposes:

Technical Proposal	50 points
Management Proposal	30 points
Cost Proposal	20 points
Total Possible	100 points

Evaluation criteria will include:

- Overall responsiveness to the RFP
- Discussion of methodological and technical issues
- Quality and clarity of work plan
- Project team structure and accountability in the management plan
- Assigned staff qualifications and experience
- References
- Quality and clarity of cost proposal

6.3 Disregard Oral Presentations

Proposals shall be based on material contained in the RFP and official addenda sent to all bidders. The bidder is instructed to disregard any previous draft material received and all oral presentations.

6.4 Notification to Unsuccessful Bidders

After the award is made, firms whose proposals have not been selected for further negotiation or award will be notified via Fax, at the Fax number given in the proposal.

6.5 General Terms and Conditions and Federal Certifications and Assurances

Washington State General Terms and Conditions and Federal Certifications and Assurances concerning lobbying, debarment, suspension, and other responsibility matters; and drug-free work place requirements shall be included in any contract awarded as a result of the RFP and are not negotiable. Copies of General Terms and Conditions and Federal Certifications are available on request.

6.6 Debriefing of Unsuccessful Bidders

Bidders who submit proposals that are not selected will be given the opportunity for a debriefing conference. The RFP coordinator must receive the request for a debriefing conference within two business days after the Notification of Unsuccessful Bidder letter is faxed to the Bidder. The debriefing must be held within two (2) business days of the request.

Discussion will be limited to a critique of the requesting bidder's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

6.7 Protest Procedure

This procedure is available to bidders who submitted a response to this solicitation document and who have participated in a debriefing conference. To be accepted, a bid protest must be received before 5:00 pm on the fifth business day following the receipt of the Notification of Unsuccessful Bidder letter.

Bidders protesting this procurement shall follow the procedures described herein. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to bidders under this procurement.

All protests must be in writing and signed by the protesting party or an authorized agent. The protest must state the grounds for the protest with specific and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination, conflict of interest on the part of the evaluator.
- Errors in computing the score.
- Noncompliance with procedures described in the procurement document or Workforce Board policy.

Upon receipt of a protest, a protest review will be held by Workforce Board. All available facts will be considered and the Workforce Board Executive Director or her designee will issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another bidder who submitted a proposal, such bidder will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold Workforce Board's action.
- Find only technical and harmless errors in the Workforce Board's acquisition process and determine the Workforce Board to be in substantial compliance and reject the protest.
- Find merit in the protest and provide Workforce Board options which may include:
 - ◆ Correct the errors and reevaluate all proposals.
 - ◆ Reissue the solicitation document and begin a new process.
 - ◆ Make other findings and determine other courses of action as appropriate.

If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken. If the Workforce Board determines that the protest is without merit, the Workforce Board will enter into a contract with the apparently successful bidder.

6.8 Proprietary Information/Public Disclosure

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Workforce Board Executive Director and the apparent successful bidder; thereafter the proposals shall be deemed public records as defined in RCW 42.17.250 to .348.

Any information in the proposal that the bidder desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.17.250 to .348 must be clearly designated. The page must be identified and the particular exception(s) from disclosure upon which the bidder is making its claim. Each page claimed to be exempt from disclosure must be clearly identified by the word “**confidential**” printed on the lower right hand corner of the page.

The Workforce Board will consider a bidder's request(s) for exemption from disclosure; however, the Workforce Board will make a decision predicated upon applicable laws. Making the entire proposal exempt from disclosure will not be honored. The bidder must be reasonable in designating information as confidential. Any information marked as proprietary in the proposal will not be made available until the affected bidder has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping as outlined in RCW 42.17.300. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be addressed to the RFP Coordinator.

RFP APPENDIX

A. Checklist for Responsiveness

Washington State General Terms and Conditions and Federal Certifications and Assurances are required parts of any Workforce Board contract for services under this RFP and are available on request.

Appendix

Checklist for Responsiveness

Proposal Format

- _____ Original plus 5 copies received at Workforce Board
- _____ Arrived by May 13, 2005 at 5:00 p.m.
- _____ Printed on 8.5x11 paper with font size no smaller than 10-point, in binders with tabs marking key sections
- _____ Technical proposal is no more than 25 pages

Signatures

- _____ Letter of submittal is signed by person authorized to legally bind company

Minimum Requirements

- _____ Adequate staff resources available between July 1, 2005 and March 31, 2006
- _____ Significant experience in conducting non-experimental net impact studies and cost-benefit analyses
- _____ Significant experience in evaluating education, employment and training programs
- _____ Cost proposal is less than or equal to \$250,000.

Identifying Information (page number noted where appropriate)

- _____ Name, address, phone, and fax number of contracted agency
- _____ Name, address, phone, and fax number of principal officers
- _____ Legal status of the bidder and year entity was established
- _____ Federal employer ID number
- _____ WUBI number from the Department of Revenue
- _____ Name of project manager
- _____ If prior Washington State employees are members of the contractor and/or subcontractor(s), is information on job title, agency, and separation date provided?
- _____ If former state employees are on the board of directors in organization, is information provided?